

**Real Property Administration Training Governance Group Meeting**  
March 13, 2008

Present: Jeff Bartholomew, David Briggs, Cathy Conklin, Sally Cooney (Facilitator), Tom Frey, David Jackson, Cyndy Knox, Joe Maciejewski, Gene Monaco, John Zukowski  
Resource: Jim O’Keeffe, Steve King, Maureen Wetter  
Recorder: Joan Wiech  
Absent: Nelson Bills, Suzette Booy

The minutes from the October 18, 2007 meeting have been posted to the website.

**Assessment Administration, Commercial/Industrial, Mass Appraisal**

An updated New Program Course Development Status Report was handed out to the group. Two new Assessment Administration classes have been held, some revisions will be made to the course, overall they were successful. It has been necessary to extend the course length from 5 – 6 days, two sessions at 3 days each. Some students found the course overwhelming, especially with the pre-work and the inclusion of the Exemption Administration material. Assessment Administration is also available in an on-line version. The length of the online course is four weeks with the exam offered at each of the regional offices.

The new Mass Appraisal course was offered in February 2008. Some revisions will be made and the course will be offered again in June 2008.

The on-line version of Assessor Orientation has been going very well. It was mentioned that some County Directors still like paper materials.

The Farm Appraisal course has been scheduled for June 2008 and at the 2008 Utica Summer Training School.

Work on the development of the KSA’s for the Forest Appraisal course has not been started due to lack of resources. The group discussed issues concerning the current valuation methodology and felt some of these issues should be addressed before work on the KSA’s begins. The present Forest Appraisal course is not being taught at this time.

ORPS has been looking into equivalents for the Commercial Industrial component. One class we are considering to be an equivalent is IAAO 312.

**Tax Mapping, Tax Collection and Enforcement**

The Tax Mapping course will be offered at the County Directors Conference in 2009. The length of this course is three hours. It will be incorporated into a full day session with other tax mapping issues at the conference. It was noted that this course would also be beneficial for assessors to take.

The Tax Collection and Enforcement course is also three hours. It will be incorporated into a full day session along with a Tax Receiver course at the 2009 County Director Conference. Assessors are eligible to receive continuing education credit if they take similar courses.

### **Cost, Market and Income Approaches to Value, Ethics**

The course content for Appraisal Principles and Procedures and Application of the Three Approaches to Value has been tentatively approved. ORPS staff provided comments relative to the course material. The comments will be reviewed and changes made, if appropriate, after both courses are first offered this summer. Each valuation course will be scheduled at Cornell and the ORPS 2008 Summer Training Program. The same textbook will be used for both courses and will be an excellent reference for Assessors. It was mentioned that the statistical component in the course content was not referenced the same as all other components, Tom will look into it.

The course content for "Ethics for Assessors" has been accepted as satisfying the ethics requirement for certification and recertification. ORPS management previously expressed some concern about the need for instructors who are certified to teach an Ethics course. For those instructors lacking a certification, one of the ORPS attorneys will attend the initial class taught by each instructor to ensure that they are able to handle the material and class discussion effectively. Two classes have been offered to date and went well. Counsel's office approved both instructors.

The IAAO Ethics course will be held in May at the Northeast Regional Association of Assessing Officers. ORPS will need to review this course. Courses that have been approved have been posted to the Website.

### **Training/Status/News/Misc.Topics**

#### *Directors:*

- The Summer Conference is scheduled for July 28, 29, 30, 2008 in Saratoga NY.
- The sessions include Legal Updates, Conservation Easements, Sales Ratios, and a session with ORPS Director.

#### *Assessors:*

- Hosting the Northeast Regional Association of Assessing Officers Conference on May 4-8, 2008 in Lake Placid. Assessors from Canada, and from Maine to Maryland will be attending. The sessions include: Conservation Easements, Assessment Administration Models, IAAO Forum-House Construction, Discounted Cash Flow, Time Management, Standards of Professional Ethics, IAAO Workshops, and HP12C Instruction.
- The new valuation courses have been scheduled at ORPS 2008 Summer Training Program and Cornell as mentioned previously.
- Other upcoming courses that have been scheduled are Computers in the Assessor's Office, SPSS Modeling, IAAO Course 400, Assessment Administration, Residential Data Collection, HP12C Instruction, Apartment Valuation, Industrial Building Valuation.

- Have been working on outlines for the training at the September/Fall Conference.
- It was noted that the AOT attendance was lower than usual.

*ORPS:*

- The dates for the Summer Training Program at SUNYIT, Utica are August 4-8, 2008. The following courses will be offered: Assessment Administration, Fundamentals of Data Collection, Introduction to Farm Appraisal, Fundamentals of Mass Appraisal, Ethical Decision Making, RPSV4 Commercial Valuation, Advanced RPSV4 Report Writing, Using the ORPS Internet Site, Excel for Assessors, Appraisal Principles and Procedures and Application of the Three Approaches to Value.
- All Assessors have been notified about their training requirements based on the New Training Program. ( 150 Assessors are not certified )
- The EDS computer system is being updated to meet the new program requirements.
- Letters were mailed to County Executives and Town Supervisors (60 munis and 6 counties) reminding them of expired assessor/county director terms requiring appointments and reappointments.

The team discussed whether the Data Collection course that is offered at Cornell can be an equivalent for the assessor /county director training requirement. The course consists of a half-week of residential training and a half-week of commercial training but does not have an exam at the end of week. They will look into the possibility of including the self study exam to receive credit.

**Fiscal Update**

The team discussed the handout which reported the status of New York City expenses for courses provided since 2006 and the status of the upstate assessor/county director training reimbursement for the 07/08 fiscal year. Until the 2008/09 Budget is passed we will not know how much money will be available for reimbursement in the upcoming fiscal year nor will we know whether there will be any carryover funds. ORPS is also required to submit a spending plan to the Division of Budget for approval.

**NYC Training Program Update/Rules**

The rules for the New York City Assessor Training Program have not been finalized; they are still in conflict with the statute. The present rules state that certification is required by April 1, 2008 and the statute states the certification requirement is 2009. Nothing has been established at this point with the court case.

The team agreed that further discussion is necessary between ORPS and New York City officials about the training program. Some NYC assessors feel that the required courses are too difficult. It was noted that the total number of training days required are the same for NYC and upstate assessors. The group also discussed the possibility of a

comprehensive exam and how it should be administered. More discussion will be necessary.

The team agreed that they also need to discuss with NYC officials issues concerning the Assessment Administration training course and the possibility of waiving the training requirement based on experience.

### **RPT Equity Information Gathering Report/BAR Training**

The team discussed the BAR Training Video in relation to whether it is useful as is or if it requires revisions. One suggestion was to change the format from VHS to DVD. Some thought we shouldn't invest the money as it is; we should evaluate the video and make necessary revisions first. It was also suggested that a new course be developed beginning with KSA's. Since the ideas suggested will require additional funding, ORPS will look into that possibility.

### **The Role of Training Governance**

The team discussed several issues concerning the future of the Training Governance group. All were in agreement that the quality of assessing has improved consistently, especially in the last five years. With the expiration of the group charter, it was felt that several issues should be addressed.

With the recent implementation of the new program the group feels that the program should be reviewed and evaluated after one year. Others feel there is still unfinished business concerning course delivery and the structure of the group should not change until everything has been completed. Another issue to discuss is the group's relationship to RPTAC.

With the expiration of the group charter and with new leadership in ORPS it is felt that the charter should undergo review and revisions. The agency direction needs to be considered. This discussion should include the Executive Director as he may have his own opinions on the future of the Training Governance Group.

### **Review membership**

The team reviewed the expiration dates of the members of the group. Some group members will need to be reappointed. Further discussions need to occur regarding the makeup of the Training Governance Group in the future.

The team also discussed how the at-large members of the team feel about their role on the Training Governance Group. They feel that they have provided objective viewpoints and in some cases mediation when necessary. They do not feel they have a conflict of interest. Overall they feel their membership has been an asset. ORPS, Assessors and County Directors all agreed and stated that the contributions made by the at-large members have been valuable.

ORPS suggested that maybe other members, such as elected officials, should be considered for future team members. It was mentioned that larger groups can become less functional.

The Assessor Association members feel they are bringing valuable information to the group also. They feel the information they receive from the training they provide has been useful in decision making with the group. Some felt that we need to look at more suitable ways of communicating information and ideas for the success of the new training program. The evaluation form at the end of the training course is useful at the time but doesn't provide us enough to evaluate whether the training was valuable and useful to the student in their position. A follow-up evaluation should be created and used by all the organizations providing the training. It should be suitable for all organizations involved and should provide each with beneficial information.

The team also needs to consider such issues as providing a measure of quality control. They need to consider how extensive their involvement will be. Other considerations are relationships between the groups, organization, formal and informal and the composition of the group.

The team agreed that today's meeting was very productive based on the fact that all team members were present at the same location.

#### **ACTION ITEMS**

Evaluate Board of Assessment Review video  
Discussion with New York City officials  
Look into statistical component of valuation courses  
Invite Executive Director to next meeting

#### **AGENDA ITEMS**

Role of Training Governance  
Review Charter  
Board of Assessment Review Video  
NYC Assessor Training Program  
Quality Control

#### **NEXT MEETING:**

August 14, 2008  
Albany – 5<sup>th</sup> Floor  
10:00 am – 3:00 pm